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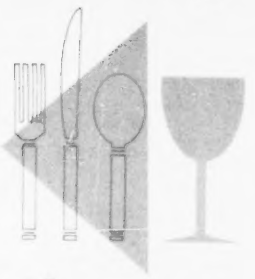

National Trend of Business in the Restaurant Industry

VOLUME I, NUMBER 5 MAY, 1981

During May 1981 the total average receipt per cover was $6.94, 10.3 percent higher than May 1980. The change in total food and beverage sales of 8.1 percent over May 1980 outpaced the change in total food and beverage costs which were 6.0 percent.

According to our sample, restaurants in the Northeast and North Central areas of the country enjoyed favorable sales growth, while also keeping food and beverage costs in line. However, while the South Central and Western establishments reported the highest growth in sales of all regions, their food and beverage costs grew at a faster pace than their total sales. Western properties achieved the highest average receipt per cover - $9.70, increasing 12.1 percent over May 1980.

Payroll costs in May 1981 were 7.6 percent higher than May 1980. While the lowest volume restaurants reported little change from May 1980, restaurants with sales over $107,036 experienced an increase in payroll costs of 10.4 percent.

When comparing May 1981 with May 1980, total sales per payroll dollar remained stable at $3.39 and $3.37, respectively. The number of covers per full-time equivalent employee decreased 2.8 percent from 356 covers in May 1981.

Year-to-date statistics indicate that the average receipt per cover as of May 1981 rose 9.9 percent to $7.76 when compared with the same period last year. Restaurants offering full menus with tableservice posted the highest total May 1981 average check - $8.55, while cafeterias averaged a $1.63 ticket.

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TREND REPORT MAY 1981 COMPARED WITH MAY 1980

	SALES % CHANGE			COST % CHANGE				AVERAGE RECEIPT PER COVER	
	TOTAL	FOOD[1]	BEV.[1]	TOTAL	FOOD[1]	BEV.[1]	PAYROLL	MAY	% CHG
TOTAL	8.1	7.5	11.2	6.0	4.4	4.9	7.6	$ 6.94	10.3
AFFILIATION:									
Single Unit	13.2	12.7	15.7	11.1	5.8	9.7	8.5	$ 9.65	9.3
Multi-Unit:									
Company-Owned	6.2	5.7	*	1.7	-0.6	*	28.0	2.89	5.6
Franchised	5.4	4.8	8.6	3.7	4.0	1.1	5.8	6.86	11.0
AREA:									
Northeast	7.1	6.0	22.7	4.0	-7.0	14.0	1.6	$ 5.95	7.3
Southeast	-5.6	-7.1	3.0	-10.9	-10.4	-14.8	-6.7	6.50	16.3
North Central	9.5	10.4	4.7	5.2	5.3	4.1	7.6	6.16	6.2
South Central	12.1	12.2	11.8	14.0	14.6	10.6	13.5	4.25	6.6
West	11.8	10.6	16.7	12.4	12.9	9.6	13.7	9.70	12.1
SALES PER MONTH:									
Under $41184.	9.9	9.8	11.6	2.6	1.9	26.0	0.1	$ 3.74	13.0
$41184. TO $64967.	9.2	8.2	24.5	6.6	5.6	25.6	3.6	4.68	9.5
$64967. TO $107036.	9.1	10.0	4.6	3.8	4.4	-0.1	3.1	6.29	7.4
Over $107036.	7.5	6.4	12.2	6.9	4.4	4.4	10.4	7.96	11.8
NUMBER OF SEATS:									
Under 107	15.2	15.2	15.0	9.6	10.0	5.9	22.8	$ 3.33	9.3
107 TO 160	11.5	10.6	29.7	8.3	7.1	40.5	3.5	4.34	8.0
160 TO 288.7	9.4	9.1	10.7	9.3	5.8	4.2	10.7	8.28	10.5
Over 288.7	3.1	1.5	9.5	-	-0.4	2.9	1.2	8.10	13.3
TYPE:									
Cafeteria	*	*	*	*	*	*	*	$ *	*
Coffee Shop	7.1	7.0	*	5.1	5.0	*	1.7	*	*
Full Menu:									
Tableservice	5.5	4.9	8.0	4.1	0.8	3.9	1.9	$ 7.93	11.1
Limited Menu:									
Tableservice	10.1	8.1	20.8	9.7	10.7	1.5	19.1	7.98	12.1
No Tableservice	15.8	16.9	*	12.6	12.6	*	30.3	2.82	5.0
Other	27.6	23.1	*	6.0	1.9	*	16.9	*	*

* INSUFFICIENT RESPONSE

\- NO CHANGE

1 Since all restaurants did not report data for each line, each line item has been analyzed separately and may therefore not add to totals shown.